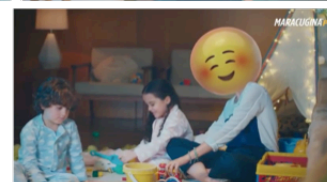
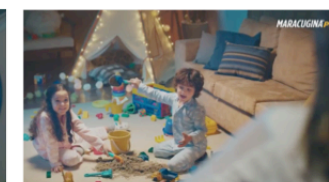
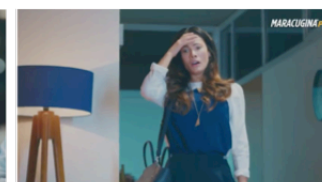
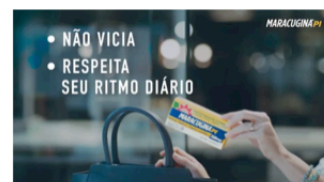
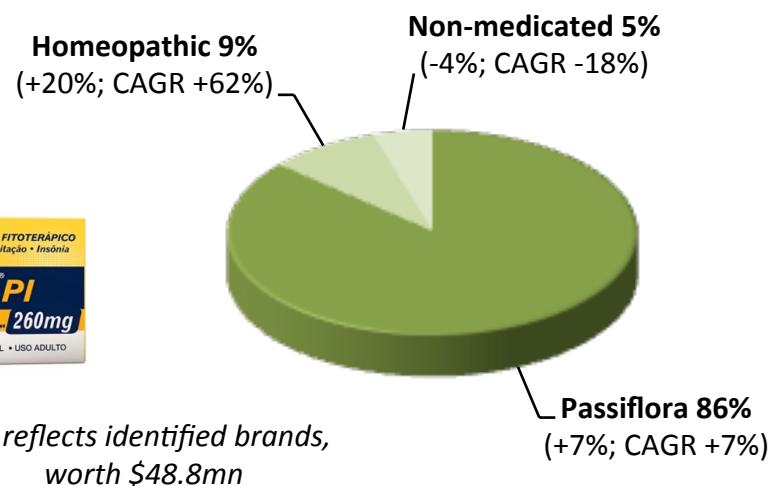


Brazil – Sedatives & sleep aids

- **Ritmoneuran** (passiflora) potentially benefits from its variety of versions, available in tablet, solution and monodose liquid vial formats
- **Maracugina PI** relaunched April 2018 after absence starting 2016, attributed by marketer to “commercial reasons”
- Brand renamed PI to reflect its passiflora-only formula (previously additional hawthorn and mulungu)
- Brand now formulated similarly to Seakalm (passiflora 260mg, 9.1mg of total flavonoids as vitexin), backed by updated brand website and new ad campaign
- Ad (*see right*) depicted woman with angry emoji icon for head, getting stressed by annoyances throughout the day before she takes Maracugina PI and is able to play with her children happily, despite the mess on living room floor
- **Respire Melhor** continued to decline, lacking promotional support
- Nasal strips claim to open the air passages and improve breathing; primarily positioned to treat congestion caused by allergies and colds, also claiming to reduce snoring



Brazil sedatives & sleep aids sales by ingredient segment 2017, (MSP, \$mn)



China – Other products for sleep

Trends & developments in sleep-focused products

- According to TCM principles, insomnia can arise as result of various lifestyle habits which cause “energy” disruptions
- Menopause supplements commonly claim to alleviate insomnia, disruptions in kidney energy considered main cause of symptoms
- Dong-e E-Jiao (tonics & cure alls) is positioned to treat “blood and qi deficiencies”, treating insomnia and other linked symptoms
- Among laxatives, Compounded Aloe Capsule claims to treat range of GI disorders and insomnia, claiming to clear “heart and liver”

Top categories with sleep-focused SKUs

Menopause

Tonics & cure alls

Laxatives

Well-established



Low presence

Menopause

- In traditional Chinese pharmacopeia insomnia is often linked to kidney energy weakness, which is believed get worse with age and be prime contributor towards menopause and its symptoms
- Menopause supplement **Jing Xin Liquid** (Shenzhen Joincare) claims to alleviate insomnia, hot flashes and irritability and increase bone density in women aged 40+
- Other options in the small category are similarly positioned; No.2 brand **XianTian Kun Tai Capsule** (Guiyang XinTian) claims to calm the nerves and treat various symptoms of menopause (e.g. hot flashes, irritability) including insomnia



Jing Xin Liquid

Notable innovations in France's sleep market



Granions Somdor + Douce Nuit (EA Pharma)

Sleep aids, September 2016

- **Granions Somdor+ Douce Nuit melatonin-infused chocolate** registered as supplement, each square of dark chocolate containing melatonin 1mg
- Recommended dosage one square 30 minutes before bed
- Positioned for those affected by sleeping difficulties and to reduce time it takes to fall asleep
- Product specially designed for people concerned about **sleep problems linked to disrupted sleep patterns**, e.g. people on long-distance flights or travelling through night
- Product's slogan is **"the little pleasure for sleeping well"**



NicoRelay (Pierre Fabre)

Sleep aids, January 2017

- **NicoRelay** lozenges are registered supplement which combines passiflora and zinc to **help those trying to quit smoking to better manage stress, nervousness and sleep**
- **Complementary line extension of popular Nico- smoking control line** (total sales over \$25mn) which includes Nicopatch and Nicopass (gum)
- Passiflora works to control nervousness and contribute to better sleep, while zinc helps to maintain cognitive functions such as concentration, alertness, attention as well as resistance to stress
- Lozenges are sugar free and fresh-mint flavoured

USA – Sedatives & sleep aids

- **Breathe Right** leads nasal devices segment, but sales in decline owing to low levels of innovation, with line extensions including stronger, lavender-scented and clear strips
- New TV ad campaign 2018 showed woman suffering nasal congestion while trying to sleep helped by Breathe Right nasal strips; tagline “Breathe Better. Sleep Better”



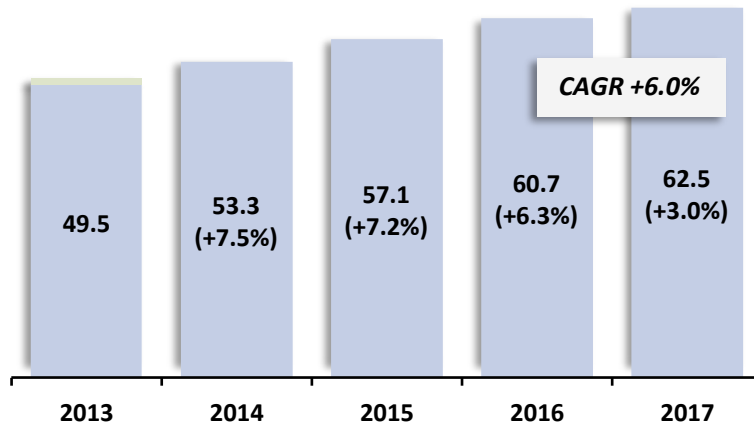
TV ads showed walls closing in on woman struggling to sleep, before using Breathe Right to help her float off to sleep; ad explains “When nighttime nasal congestion closes in, Breathe Right strips are designed to simply open your nose right back up”

- Although brand was once virtually unchallenged in device space, it is now facing strong competition (*including from other types of devices – see breakout box next page*), encouraged by high consumer adoption of healthcare devices as viable alternative to systemic treatments
- **Theravent** (Foundation; \$1.9mn) is claimed to be only FDA-cleared device to use EPAP technology to reduce or eliminate snoring; strips cover nasal passages to create gentle pressure that helps keep soft tissue in airways from vibrating
- TV ads launched September 2017 promote loving relationships, getting right to heart of how snoring can make a bedmate suffer



Spain – Overview

Spain sedatives & sleep aids sales 2013-17
(MSP, \$mn)



Sleep trends & developments in Spain

- **High incidence of stress and insomnia boosts sales**

Category posted strong growth since 2013, with high numbers of Spaniards suffering sleep problems

- **Herbals & naturals a major growth driver**

Owing to strong safety profile, herbals & naturals generate largest share of market and outperformed non-H&Ns

- **Lack of innovation hampering category development**

Large proportion of new launches melatonin-based, leading to increasingly saturated competitive landscape

- According to study in *IM Farmacias* July 2017, around 30% of Spanish adults suffer sleep problems, with chronic insomnia affecting 50% of those aged 50+ years
- Marketer Diafarm undertook study that found three-quarters of Spanish students suffer physical symptoms of anxiety during exam season (including nausea or mental blocks), with 25% experiencing insomnia
- Among working population, 77% of Spaniards claim to have not changed job specifically owing to stress associated with finding new role; while Spanish economy picked up in recent years, widespread concern still exists over job security and economic stability